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**Term:**

**Display:**  **Documents in Display Format:**  **Starting with Number**

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### Search History

**DATE:** Thursday, November 17, 2005 [Printable Copy](#) [Create Case](#)

#### Set Name Query

side by side

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result set

DB=USPT,USOC,EPAB,JPAB,DWPI,TDBD; PLUR=YES; OP=OR

<u>L6</u>	L5 and (table or tabulat\$ or matri\$)	19	<u>L6</u>
<u>L5</u>	((customer or consumer or buyer or purchaser) adj3 equit\$)	44	<u>L5</u>
<u>L4</u>	L3	1	<u>L4</u>
<u>L3</u>	(customer-equit\$)	1	<u>L3</u>
<u>L2</u>	L1 and (table or tabulat\$ or matri\$)	5	<u>L2</u>
<u>L1</u>	(customer adj equit\$)	9	<u>L1</u>

END OF SEARCH HISTORY

Dialog Search 11/17/05

Trying 31060000009999...Open

DIALOG INFORMATION SERVICES

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Welcome to DIALOG

### Status: Login successfulDialog level 05.08.03D

Last logoff: 31oct05 11:30:56

Logon file405 17nov05 13:23:48

\*\*\* ANNOUNCEMENT \*\*\*

\*\*\*

--UPDATED: Important Notice to Freelance Authors--

See HELP FREELANCE for more information

\*\*\*

NEW FILES RELEASED

\*\*\*Index Chemicus (File 302)

\*\*\*Inspe (File 202)

\*\*\*Physical Education Index (File 138)

\*\*\*Computer and Information Systems Abstracts (File 56)

\*\*\*Electronics and Communications Abstracts (File 57)

\*\*\*Solid State and Superconductivity Abstracts (File 68)

\*\*\*ANTE: Abstracts in New Technologies (File 60)

\*\*\*

RELOADS COMPLETED

\*\*\* The 2005 reload of the CLAIMS files (Files 340, 341, 942)  
is now available online.

RESUMED UPDATING

\*\*\*ERIC (File 1)

\*\*\*

Chemical Structure Searching now available in Prous Science Drug  
Data Report (F452), Prous Science Drugs of the Future (F453),  
IMS R&D Focus (F445/955), Pharmaprojects (F128/928), Beilstein  
Facts (F390), Derwent Chemistry Resource (F355) and Index Chemicus  
(File 302).

\*\*\*

>>> Enter BEGIN HOMEBASE for Dialog Announcements <<<

>>> of new databases, price changes, etc. <<<

\*\*\*\*

FTCOR is set ON as an alias for 15,9,623,810,275,624

FTCOR2 is set ON as an alias for 813,636,621,16,160,148,20

NFTCOR is set ON as an alias for 77,35,583,2,65,233,99

FTHEALTH is set ON as an alias for 442,43,149,444,129,130,455

NFTHEALTH is set ON as an alias for 5,73,151,155,34,434,74,42

>>>An alias cannot be more than 15 characters in length.

>>>No alias set.

>>>An alias cannot be more than 15 characters in length.

>>>No alias set.

FTADVERTISING is set ON as an alias for 635,570,PAPERSMJ,PAPERSEU

\* \* \*

SYSTEM:HOME

Cost is in DialUnits

Menu System II: D2 version 1.7.9 term=ASCII

\*\*\* DIALOG HOMEBASE(SM) Main Menu \*\*\*

Information:

1. Announcements (new files, reloads, etc.)
2. Database, Rates, & Command Descriptions
3. Help in Choosing Databases for Your Topic
4. Customer Services (telephone assistance, training, seminars, etc.)
5. Product Descriptions

Connections:

6. DIALOG(R) Document Delivery
7. Data Star(R)

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/H = Help                      /L = Logoff                      /NOMENU = Command Mode

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?

Terminal set to DLINK

\*\*\* DIALOG HOMEBASE(SM) Main Menu \*\*\*

Information:

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? b 15, 9, 623, 810, 275, 624, 636, 621, 813, 16, 160, 148, 20, 77, 35, 583, 65, 2, 233, 473, 474, 475, 634, 256, 348, 349,, 347, 625, 637, 169, 268, 626, 267, 139

>>> 77 does not exist

>>> 233 does not exist

>>> 2 of the specified files are not available

17nov05 13:26:45 User242976 Session D53.1

\$0.00 0.258 DialUnits FileHomeBase

\$0.00 Estimated cost FileHomeBase

\$0.80 TELNET

\$0.80 Estimated cost this search

\$0.80 Estimated total session cost 0.258 DialUnits

SYSTEM:OS - DIALOG OneSearch

File 15:ABI/Inform(R) 1971-2005/Nov 17

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File 9:Business & Industry(R) Jul/1994-2005/Nov 16

(c) 2005 The Gale Group  
 File 623:Business Week 1985-2005/Nov 17  
 (c) 2005 The McGraw-Hill Companies Inc  
 File 810:Business Wire 1986-1999/Feb 28  
 (c) 1999 Business Wire  
 File 275:Gale Group Computer DB(TM) 1983-2005/Nov 16  
 (c) 2005 The Gale Group  
 File 624:McGraw-Hill Publications 1985-2005/Nov 17  
 (c) 2005 McGraw-Hill Co. Inc  
**\*File 624: Homeland Security & Defense and 9 Platt energy journals added**  
 Please see HELP NEWS624 for more  
 File 636:Gale Group Newsletter DB(TM) 1987-2005/Nov 17  
 (c) 2005 The Gale Group  
 File 621:Gale Group New Prod.Annou.(R) 1985-2005/Nov 17  
 (c) 2005 The Gale Group  
 File 813:PR Newswire 1987-1999/Apr 30  
 (c) 1999 PR Newswire Association Inc  
 File 16:Gale Group PROMT(R) 1990-2005/Nov 17  
 (c) 2005 The Gale Group  
 File 160:Gale Group PROMT(R) 1972-1989  
 (c) 1999 The Gale Group  
 File 148:Gale Group Trade & Industry DB 1976-2005/Nov 17  
 (c)2005 The Gale Group  
 File 20:Dialog Global Reporter 1997-2005/Nov 17  
 (c) 2005 Dialog  
 File 35:Dissertation Abs Online 1861-2005/Oct  
 (c) 2005 ProQuest Info&Learning  
 File 583:Gale Group Globalbase(TM) 1986-2002/Dec 13  
 (c) 2002 The Gale Group  
**\*File 583: This file is no longer updating as of 12-13-2002.**  
 File 65:Inside Conferences 1993-2005/Nov W2  
 (c) 2005 BLDSC all rts. reserv.  
 File 2:INSPEC 1898-2005/Nov W1  
 (c) 2005 Institution of Electrical Engineers  
**\*File 2: Archive data back to 1898 has been added to File 2.**  
 File 473:FINANCIAL TIMES ABSTRACTS 1998-2001/APR 02  
 (c) 2001 THE NEW YORK TIMES  
**\*File 473: This file will not update after March 31, 2001.**  
 It will remain on Dialog as a closed file.  
 File 474:New York Times Abs 1969-2005/Nov 17  
 (c) 2005 The New York Times  
 File 475:Wall Street Journal Abs 1973-2005/Nov 17  
 (c) 2005 The New York Times  
 File 634:San Jose Mercury Jun 1985-2005/Nov 16  
 (c) 2005 San Jose Mercury News  
 File 256:TecInfoSource 82-2005/Feb  
 (c) 2005 Info.Sources Inc  
 File 348:EUROPEAN PATENTS 1978-2005/Nov W01  
 (c) 2005 European Patent Office  
 File 349:PCT FULLTEXT 1979-2005/UB=20051110,UT=20051103  
 (c) 2005 WIPO/Univentio  
 File 347:JAPIO Nov 1976-2005/Jul(Updated 051102)  
 (c) 2005 JPO & JAPIO  
 File 625:American Banker Publications 1981-2005/Nov 15  
 (c) 2005 American Banker  
 File 637:Journal of Commerce 1986-2005/Nov 17  
 (c) 2005 Commonwealth Bus. Media  
 File 169:Insurance Periodicals 1984-1999/Nov 15  
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\*File 169: This file is closed (no longer updating).

File 268:Banking Info Source 1981-2005/Oct W5

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\*File 268: SELECT IMAGE AVAILABILITY FOR PROQUEST FILES

ENTER 'HELP PROQUEST' FOR MORE

File 626:Bond Buyer Full Text 1981-2005/Nov 16

(c) 2005 Bond Buyer

File 267:Finance & Banking Newsletters 2005/Nov 15

(c) 2005 Dialog

File 139:EconLit 1969-2005/Nov

(c) 2005 American Economic Association

Set	Items	Description
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? s ((consumer or customer or purchaser or buyer) (2a)equit?)

>>>Invalid syntax

?

PLEASE ENTER A COMMAND OR BE LOGGED OFF IN 5 MINUTES

? s ((consumer or customer or purchase or buyer) (2w)equit?)

Processed 10 of 32 files ...

Processing

Processing

Processed 20 of 32 files ...

Completed processing all files

5346773	CONSUMER
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5984538	CUSTOMER
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4264842	PURCHASE
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932550	BUYER
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4826981	EQUIT?
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S1	15942	((CONSUMER OR CUSTOMER OR PURCHASE OR BUYER) (2W)EQUIT?)
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? s s1 and (matrix or matrices or table or tabulat?)

15942	S1
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933845	MATRIX
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155225	MATRICES
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3122872	TABLE
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121369	TABULAT?
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S2	1534	S1 AND (MATRIX OR MATRICES OR TABLE OR TABULAT?)
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? s s2 and ((growth or stability) adj ratio)

>>>Invalid syntax

? s s2 and ((growth or stability) adj ratio)

>>>Invalid syntax

? s s2 and ((tgrowth or stability) (2w) ratio)

1534	S2
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13	TGROWTH
----	---------

1757204	STABILITY
---------	-----------

2447287	RATIO
---------	-------

787	(TGROWTH OR STABILITY) (2W)RATIO
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S3	1	S2 AND ((TGROWTH OR STABILITY) (2W) RATIO)
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Display 3/9/1 (Item 1 from file: 348)

DIALOG(R)File 348:EUROPEAN PATENTS

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01526621

CUSTOMER'S ASSETS EVALUATING SYSTEM

KUNDENVERMOGENBEWERTUNGSSYSTEM

SYSTEME D'EVALUATION DE LA CLIENTELE

PATENT ASSIGNEE:

DENTSU TEC INC., (2641671), 8-9, Tsukiji 1-chome, Chuo-ku, Tokyo 104-8411

, (JP), (Applicant designated States: all)

INVENTOR:

WATARAI, Koji, c/o DENTSU TEC INC., 8-9, Tsukiji 1-chome, Chuo-ku, Tokyo  
104-8411, (JP)

KAWAI, Tetsuya, c/o DENTSU TEC INC., 8-9, Tsukiji 1-chome, Chuo-ku, Tokyo  
104-8411, (JP)

LEGAL REPRESENTATIVE:

Gray, James (94641), Withers & Rogers, Goldings House, 2 Hays Lane,  
London SE1 2HW, (GB)

PATENT (CC, No, Kind, Date): EP 1391836 A1 040225 (Basic)  
WO 2002091264 021114

APPLICATION (CC, No, Date): EP 2002708693 020327; WO 2002JP3012 020327

PRIORITY (CC, No, Date): JP 2001130189 010426

DESIGNATED STATES: AT; BE; CH; CY; DE; DK; ES; FI; FR; GB; GR; IE; IT; LI;  
LU; MC; NL; PT; SE; TR

EXTENDED DESIGNATED STATES: AL; LT; LV; MK; RO; SI

INTERNATIONAL PATENT CLASS: G06F-017/60; G07G-001/14

ABSTRACT EP 1391836 A1

The object of the present invention is to provide a system for evaluating the **customer equity** of products and services provided by a company, with consideration of customer-purchase trends, and to provide a means for evaluating the ratio of repeat customers and the **customer - equity** growth ratio by store, region, and/or customer group, and to provide data for establishing an optimal plan for increasing sales. A system 100 for evaluating **customer equity** according to the present invention comprises a computer system 2 for conducting sales management for a company, and an evaluation computer 10 connected to the computer system 2 via a communications line 5. The evaluation computer 10 comprises a Web server 11, a communications controller 15, an application server 12, and a database 14 for recording purchase records received from a company or store. The database comprises a **table** of original records 14a for recording purchase records in the order that they are generated, a master **table** of customers 14b, and a **tabulation table** 14c for sorting records by time period. The application server 12 comprises a purchase-data collecting means 12a, a **customer - equity** sorting means 12b, and a **customer - equity** evaluation means 12c. The **customer - equity** evaluation means 12c comprises a total- **customer - equity** **tabulating** means 12c-1; an average- **customer - equity** **tabulating** means 12c-2; a means of **tabulating** the customer- **stability ratio** 12c-3; and a **customer - equity** growth-ratio **tabulating** means 12c-4.

ABSTRACT WORD COUNT: 225

NOTE:

Figure number on first page: 0001

LEGAL STATUS (Type, Pub Date, Kind, Text):

Application: 030108 A1 International application. (Art. 158(1))

Application: 030108 A1 International application entering European  
phase

Application: 040225 A1 Published application with search report

Examination: 040225 A1 Date of request for examination: 20031121

LANGUAGE (Publication,Procedural,Application): English; English; Japanese

FULLTEXT AVAILABILITY:

Available Text	Language	Update	Word Count
CLAIMS A	(English)	200409	604
SPEC A	(English)	200409	3215
Total word count - document A			3819
Total word count - document B			0

SPECIFICATION EP 1391836 A1

Detailed Description of the Invention

Field of the Invention

The present invention relates to a system for evaluating the **customer equity** of a company selling merchandise or providing services.

Description of the Related Art

Conventionally, a company's business record and growth potential have been evaluated based on sales and assets disclosed in the company's financial statements. Further attention has been given to the company's brand name as an intangible value.

The evaluation of a company's brand assets is an important index for shareholders and investors who are interested in whether the company can secure long-term profits and whether its stock price will experience stable growth. Accordingly, there have been calls to evaluate the brand equity of companies and to list a company's evaluation as an intangible property on that company's balance sheet.

In recent years, however, advertisements have frequently featured, in information media and media on the Internet, products that are similar to or copies of famous brands that individual customers can access. Hence, brand-name companies are exposed to price competition and must counter these advertisements with their own expensive advertisements so as to distinguish their products from the others and to maintain their brand image. However, data concerning trends regarding the value of intangible assets are not available through conventional analyses of brand/product sales.

Further, there has been no data has been available to assist companies in planning the best strategy for promoting the retention and growth of their brand assets and for determining optimal policies for a store, region, and/or various classifications of customers.

In view of the foregoing, one object of the present invention is to provide a system for evaluating the **customer equity** of products and services provided by a company, with consideration of trends regarding customers' purchases.

Another object of the present invention is to provide a means for determining the repeat-customer ratio and the **customer - equity** growth ratio by store, region, and/or customer group, and to provide data for establishing an optimal plan for increasing sales.

Another object of the present invention is to identify problems and provide countermeasures thereto concerning the return on **customer equity** by store, region, and/or customer group, using a **matrix** of the repeat-customer ratio and the **customer - equity** growth ratio.

Disclosure of the Invention

A system for evaluating **customer equity** according to the present invention comprises: (1) a point-of-sale terminal, provided in a store or a computer system for sales management of a company, that includes an electronic-commercial-transaction device (hereinafter referred to as "e-commerce-transaction device"), and (2) an evaluating computer that is connected to the point-of-sale terminal or computer system via a communications line, including the Internet. The evaluating computer comprises: (1) a Web server connected to the Internet; (2) a communications controller connected to a public communications line; (3) an application server for evaluating **customer equity**; and (4) a database for recording purchase records received from a company or store.

The database comprises: (1) a **table** of original records, for recording purchase records in the order that they are generated; (2) a master **table** of customers; and (3) a **tabulation table** for sorting records by time period. The application server comprises: (1) a purchase-data collecting means for receiving purchase records from the companies and storing and recording these records in the **table** of original records; (2) a **customer - equity** sorting means for determining the classifications of **customer equity** and recording these classifications in the master **table** of customers; and (3) a **customer - equity** evaluating means for counting the records in the master **table** of customers and in the **table** of original records, and evaluating the **customer equity** for each company. The **customer - equity** evaluation means comprises: (1) a total **customer - equity tabulating** means; (2) an average-**customer - equity tabulating** means; (3) a customer-**stability - ratio tabulating** means; and (4) a **customer - equity growth-ratio tabulating** means.

With this construction, the present invention facilitates the reliable collection of purchase records and can divide the purchase-record data into specified time periods for analysis. Accordingly, the user can quickly analyze the data and formulate countermeasures in order to retain and improve the value of the brand assets of the company.

Further, the **customer - equity** sorting means performs the following functions: (1) sorting purchase records for a specific brand, product, or stores (that is the target of evaluation) into specific customer classifications; determining the periods and frequency of purchases within an evaluating period divided into prescribed time periods in which repeated purchases or store visits can be expected for the aforementioned specific brand, product, or store; (2) classifying customers in three categories, including repeat customers who have made purchases in the previous and current evaluation periods; ex-customers who have discontinued purchasing; and new customers who have begun purchasing in the current evaluation period; and (3) recording the classification codes for these customers in the master **table** of customers.

By providing a **customer - equity** sorting means, the present invention enables the user to track changes in purchase-record data.

Further, the **customer - equity** evaluation means comprises (1) a total **customer - equity tabulating** means, for counting and recording the total number of customers with transactions generated in the evaluating period, based on the purchase records; (2) an average-**customer - equity tabulating** means, for counting the monetary amounts of all purchases and for calculating and recording the purchase amount per customer; (3) a means of **tabulating** the customer-**stability ratio**, for (a) counting only the number of customers and purchase amounts for repeat customers, and (b) calculating and recording the customer-retention ratio represented in the total number of customers and their total purchase amounts; and (4) a **customer - equity growth-ratio tabulating** means, for (a) counting the number of customers and their purchase amounts in the previous evaluating period for ex-customers who made purchases in the previous evaluating period but none in the current evaluating period, (b) calculating and recording the total number of ex-customers and their purchase amounts, (c) calculating the number of new customers who began purchasing in the current evaluating period and their purchase amounts in this period, and (d) calculating and recording the ratios of new customers and their purchase amounts to ex-customers and their purchase amounts.

With this construction, means of **tabulating** the total of customer assets enables a user to track changes in the absolute number of



customers for use as an index to the total customer assets of a brand. The means of **tabulating** the average of customer assets can track changes in the absolute value of purchase worth per customer. The means of **tabulating** the customer- **stability ratio** can track the ratio of and changes in the profit stability for customer assets based on the customer- **stability ratio** . The means of **tabulating** the customer-asset growth ratio can track the ratio and rate of growth for a brand.

Further, the purchase records include at least one of a store code, a region code, or a purchase-classification code, and **customer equity** is evaluated according to such a code.

By comparing data for the same brand by store, region, or purchase classification, the system of the present invention can compare successful stores and regions having excellent customer assets to stores and regions with declining customer assets. The system can further extract successful sales policies (successful experiences) for application to other companies.

#### Brief Description of the Drawings

In the drawings:

Fig. 1 is a conceptual diagram showing the construction of a system for evaluating a company's customer assets according to the present invention.

Fig. 2 is an explanatory diagram showing the categories of **customer equity** according to the present invention.

Fig. 3 is an explanatory diagram showing the sorting method of the present invention.

Fig. 4 is an explanatory diagram showing a **matrix** for store analysis according to a preferred embodiment of the present invention.

Fig. 5 is an explanatory diagram showing a variation of the **matrix** for store analysis according to the preferred embodiment.

#### Best Mode for Carrying Out the Invention

One preferred embodiment of the present invention will be described while referring to the accompanying drawings.

Fig. 1 is a conceptual diagram showing the construction of a company's customer-asset evaluation system 100. The system 100 includes: a store 1; a point-of-sale (POS) terminal 1a that is provided in the store 1 and that can be connected to the Internet; a computer system 2 that is used for sales management in the company; a customer computer terminals 3 that can be connected to the Internet; the Internet 4; and a public communications line 5. The computer system 2 includes an e-commerce-transaction device for receiving orders from customer computer terminals 3 via the Internet 4. The computer system 2 also collects various purchase records, including records received from the store 1 and records acquired through electronic transactions.

An evaluation computer 10 is connected to either the Internet 4 or the communications line 5 for receiving purchase records from the computer system 2. Accordingly, the evaluation computer 10 comprises a Web server 11 that includes a firewall connected to the Internet 4, a communications controller 15 including a modem connected to the communications line 5, an application server 12 for controlling the evaluation process, and a database server 13 for controlling a database 14. The application server 12 and database server 13 are connected to the Web server 11 and the communications controller 15 via a LAN 16.

The database 14 comprises a **table** of original records 14a for recording purchase records in the order that they are generated, a master **table** of customers 14b, and a **tabulation table** 14c sorted by time period.

The application server 12 comprises a purchase-data collecting means 12a for receiving purchase records from either the computer system used for company sales management or the POS terminal at the store, and recording this data in the **table** of original records 14a; a **customer - equity** sorting means 12b for determining the **customer - equity** classification and recording the **customer - equity** data in the master **table** of customers 14b; and a **customer - equity** evaluation means 12c for counting entries in the master **table** of customers 14b and **table** of original records 14a so as to evaluate **customer equity**.

The **customer - equity** evaluation means 12c further comprises a total-**customer - equity** **tabulating** means 12c-1, an average-**customer - equity** **tabulating** means 12c-2, a means of **tabulating** the customer-**stability ratio** 12c-3, and a **customer - equity** growth-ratio **tabulating** means 12c-4.

The **customer - equity** sorting means 12b of the present invention has the following functions: (1) sorting purchase records for a specific brand, product, or store that is the target of evaluation into specific customer classifications; (2) determining the periods and frequency of purchase-record occurrences within an evaluating period divided into prescribed time periods in which repeated purchases or store visits can be expected for the specific brand, product, or store. Customers are classified into three categories, including repeat customers, who have repeated purchases in the previous and current evaluation periods; ex-customers, who have discontinued purchasing; and new customers, who have begun purchasing in the current evaluation period. The classification codes for these customers are stored in the master **table** of customers.

Fig. 2 is an explanatory diagram showing the categories of **customer equity**. The (square) symbol indicates a purchase record. The horizontal axis indicates the evaluation periods over time, showing the previous evaluation period (Period 1) and the current evaluation period (Period 2). Customer 1 has two purchase records (square) in Period 1 and two in Period 2. Customer 2 has two purchase records (square) in Period 1, but none in Period 2. Customer 3 has only two purchase records (square) in Period 2. According to this data, the **customer - equity** sorting means 12b categorizes Customer 1 as a repeat customer C, Customer 2 as an ex-customer D, and Customer 3 as a new customer E.

The total number of customers with purchase records (square) in Period 1, that is, the purchasers A of Period 1 is equivalent to the sum of the repeat customers C and ex-customers D. The total purchasers B in Period 2 is the sum of the repeat customers C and new customers E.

Fig. 3 is an explanatory diagram showing the sorting method of the present invention.

This diagram categorizes shifts in the number of purchasers from Period 1 to Period 2.

The vertical axis indicates the number of purchasers, while the horizontal axis shows the transition between periods. This example shows an increase in the total number of purchasers B in Period 2 in relation to the total number of purchasers A in Period 1. As shown by the passage of periods in the diagram, the total number of purchasers A in Period 1 include ex-customers D that did not make purchases in Period 2, while the total number of purchasers B in Period 2 comprises new customers E, who began purchase in this period, and repeat customers C.

The **customer - equity** evaluation means 12c will now be described in greater detail. Based on purchase records in Period 1 and Period 2, the total-**customer - equity** **tabulating** means 12c-1 counts the total number of customers having a purchase transaction in each period and records these counts in the **tabulation table** 14c.

The average- customer - equity tabulating means 12c-2 counts the monetary amounts of purchase transactions generated in each period based on the purchase records for Periods 1 and 2 and records this data in the tabulation table 14c. The average- customer - equity tabulating means 12c-2 also reads the total number of customers for Periods 1 and 2 that are already counted and recorded in the tabulation table 14c, calculates the purchase amount per customer for each Period 1 and 2, and records this data in the tabulation table 14c.

The means of tabulating the customer- stability ratio 12c-3 counts only the number of customers and purchase amounts for the repeat customers C and records this data in the tabulation table 14c. The means of tabulating the customer- stability ratio 12c-3 also reads the total number of customers and total purchase amounts for Periods 1 and 2 as recorded in the tabulation table 14c, calculates the customer-retention ratio represented by the repeat customers, and records this data in the tabulation table 14c.

The customer - equity growth-ratio tabulating means 12c-4 counts the number of customers and total amount of purchases in the previous evaluating period (Period 1) for ex-customers D who made purchases in the previous evaluating period but made no purchases in the current evaluating period (Period 2) and records the number of ex-customers and their purchase amounts in the tabulation table 14c. The customer - equity growth-ratio tabulating means 12c-4 also counts the number of customers and purchase amounts in the current purchasing period (Period 2) for new customers E who began purchasing in the current evaluating period (Period 2) and records the number of new customers and their purchase amounts in the tabulation table 14c. The customer - equity growth-ratio tabulating means 12c-4 next calculates the ratios of new customers and their purchase amounts to ex-customers and their purchase amounts and records these ratios in the tabulation table 14c.

The customer - equity evaluation means 12c creates the tabulation table 14c based on a designation code, such as a store code, region code, or purchase-classification code.

Figs. 4 and 5 each show an analytical matrix of the present embodiment created based on records in the tabulation table 14c that are sorted by store.

Records for each store are plotted in the analytical diagram of Fig. 4, wherein the vertical axis represents the purchase amount per customer tabulated and recorded by the average- customer - equity tabulating means 12c-2, and the horizontal axis represents the total number of customers tabulated and recorded by the total- customer - equity tabulating means 12c-1. In this diagram, the position of each store is represented by a black circle, white circle, triangle, diamond, or cross, according to the sales rank of a store (number of customers x purchase amount per customer).

It is possible to determine whether each store's policy for promoting sales should emphasize acquiring customers or taking measures to increase the purchase amount per customer, based on the monetary equity for each store, the average equity per customer patronizing the store, and the total number of customers. Further, it is possible to optimize the sales-promotion policy of stores with few customers by adopting policies of stores that successfully retain many customers.

Records for each store are plotted in the analytical diagram of Fig. 5, wherein the horizontal axis represents the ratio of retained customers, who are repeat customers as tabulated and recorded by the means of tabulating the customer- stability ratio 12c-3, while the vertical axis represents the ratios of the number of new customers and their

purchase amounts to the number of ex-customers and their purchase amounts as **tabulated** and recorded by the **customer - equity** growth-ratio **tabulating** means 12c-4. In this diagram, the position of each store is represented by a black circle, white circle, or cross, according to the sales rank of a store (number of customers x purchase amount per customer).

The vertical axis of this analytical diagram represents the **customer - equity** growth ratio (performance ratio), wherein the number rises as new customers are acquired. The horizontal axis represents the customer-**stability ratio** (customer-retention ratio), wherein the customer base is more stable toward the right.

The average performance ratio and average customer-retention ratio for all stores are indicated by dotted lines. This diagram enables one to evaluate the **customer equity** for each group A, B, C, and D indicated in the diagram, in order to form a basic strategy for each store.

Group A, for example, indicates superior stores showing stable growth that exceeds the average for all stores in regard to both customer retention and growth. Therefore, stores in Group A can be said to have excellent customer assets. By elucidating the factors leading to the success of this group, such factors can be applied to other problematic stores to increase the customer assets of all businesses.

Group B has an extremely high customer-asset growth ratio, but an extremely low customer- **stability ratio** . While showing positive activity, this group must adopt measures to cultivate and retain customers, in order to prevent loss of customers.

Group C includes stores in decline, wherein both the customer-**stability ratio** and customer-asset growth ratio are below average. These problematic companies must first invest more to retain customers.

Group D indicates mature companies with a high customer-retention ratio, but outdated stores having few new customers. Although the above example is a comparison of stores, it is obvious that the present invention can also be applied to an analysis of companies conducting similar businesses or an analysis of companies conducting different businesses.

#### Industrial Applicability

The present invention's system for evaluating a company's **customer equity** facilitates the reliable collection of purchase records and can divide the record data into time periods for analysis. Accordingly, a user can quickly analyze the data and formulate measures in order to retain and improve the brand assets of the company.

Further, means of **tabulating** the total of customer assets enables a user to track changes in the absolute number of customers for use as an index to the total customer assets of a brand. The means of **tabulating** the average of customer assets can track changes in the absolute value of purchase worth per customer. The means of **tabulating** the customer-**stability ratio** can track the ratio of and changes in the profit stability for customer assets based on the customer- **stability ratio** . The means of **tabulating** the customer-asset growth ratio can track the ratio and rate of growth for a brand.

By comparing data for the same brand by store, region, or purchase classification, the system of the present invention can compare successful stores and regions having excellent customer assets with stores and regions whose customer assets are declining. The system can further extract successful sales policies (successful experiences) for application to other companies.

explanation of references

1 store  
1a point-of-sale (POS) terminal  
2 computer system that is used for sales management in the company  
3 customer computer terminals  
4 Internet  
5 public communications line  
10 evaluation computer  
11 Web server  
12 application server  
12a purchase-data collecting means  
12b **customer - equity** sorting means  
12c **customer - equity** evaluation means  
12c-1 total- **customer - equity** **tabulating** means  
12c-2 average- **customer - equity** **tabulating** means  
12c-3 means of **tabulating** the customer- **stability ratio**  
12c-4 **customer - equity** growth-ratio **tabulating** means  
13 database server  
14 database  
14a **table** of original records  
14b master **table** of customers  
14c **tabulation table**  
15 communications controller  
16 LAN  
100 company's customer-asset evaluation system of this invention

CLAIMS EP 1391836 A1

1. A system for evaluating a company's **customer equity**, comprising:  
either a point-of-sale terminal provided in a store or a computer system  
for sales management of a company that includes an  
e-commerce-transaction device, and an evaluating computer connected  
to the point-of-sale terminal or computer system via a communications  
line, including the Internet; wherein the evaluating computer  
comprises:  
a Web server connected to the Internet;  
a communications controller connected to a public communications line;  
an application server for performing **customer - equity** evaluations;  
and  
a database for recording purchase records received from a company or  
store; the database comprises:  
a **table** of original records for recording purchase records in the  
order that they are generated;  
a master **table** of customers; and  
a **tabulation table** for sorting records by time period; the  
application server comprises:  
a purchase-data collecting means for receiving purchase records from  
companies and stores and recording these records in a **table** of  
original records;  
a **customer - equity** sorting means for determining the classification  
of **customer equity** and recording these classifications in the  
master **table** of customers; and  
a **customer - equity** evaluation means for counting the records in the  
master **table** of customers and **table** of original records and  
evaluating the **customer equity** for each company; and the  
**customer - equity** evaluation means comprises:  
a total- **customer - equity** **tabulating** means;  
an average- **customer - equity** **tabulating** means;  
a means of **tabulating** the customer- **stability ratio**; and

- a **customer - equity growth-ratio tabulating** means.
2. A system for evaluating **customer equity** as recited in Claim 1, wherein the **customer - equity** sorting means performs the following functions: (1) sorting, into specific customer classifications, purchase records for a specific brand, product, or store that is the target of evaluation; (2) determining the periods and frequency of purchase-record occurrences within an evaluating period divided into prescribed time periods in which repeated purchases or store visits can be expected for the specific brand, product, or store that is the target of evaluation; (3) classifying customers into three categories, including repeat customers, who have repeated purchases in the previous and current evaluation periods; ex-customers, who made purchases in the previous evaluation period but who have made no purchases in the current evaluation period; and new customers, who have begun purchasing in the current evaluation period; and (4) recording the classification codes for these customers in the master table of customers.
3. A system for evaluating **customer equity** as recited in Claim 1 or Claim 2, wherein the **customer - equity** evaluation means comprises:
- a **total- customer - equity tabulating** means for counting and recording the total number of customers with transactions generated in the evaluating period, based on the purchase records;
  - an **average- customer - equity tabulating** means for counting the monetary amounts of all purchases and for calculating and recording the purchase amount per customer;
  - a means of **tabulating the customer- stability ratio**, for counting only the number of customers and purchase amounts for repeat customers, and for calculating and recording a customer-retention ratio represented in the total number of customers and their total purchase amounts; and
  - a **customer - equity growth-ratio tabulating** means that performs the following functions: (1) counting the number of ex-customers, and their purchase amounts, who made purchases in the previous evaluating period but none in the current evaluating period; (2) calculating and recording cumulative total of the number of such ex-customers and their purchase amounts; (3) counting the number of new customers, and their purchase amounts, who began purchasing in the current evaluating period; (4) calculating and recording cumulative total of the number of such new customers and their purchase amounts; and (5) calculating and recording the ratios of new customers and their purchase amounts to ex-customers and their purchase amounts.
4. A system for evaluating **customer equity** as recited in any of Claims 1 through 3, wherein the purchase records include at least one of a store code, a region code, or a purchase-classification code, and **customer equity** is evaluated according to such a code.

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